

Petfood Sustainability Survey




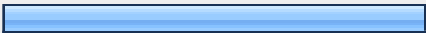
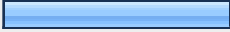
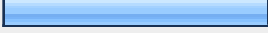

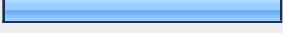
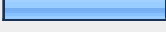
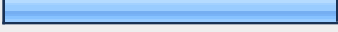
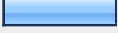

1. Where do you live?			
		Response Percent	Response Count
North America (US, Canada)		66.0%	70
South/Central America		10.4%	11
Europe		14.2%	15
Asia		4.7%	5
Asia Pacific		2.8%	3
Middle East		0.9%	1
Africa		0.9%	1
		answered question	106
		skipped question	2

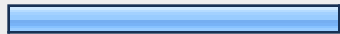
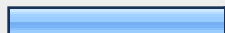
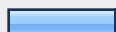
2. What is your company's/department's role in the petfood industry? (check all that apply)			
		Response Percent	Response Count
Petfood manufacturer		63.2%	67
Supplier to the industry		18.9%	20
Retailer		5.7%	6
Consultant		8.5%	9
Marketer		3.8%	4
Wholesaler, distributor, broker of pet food		10.4%	11
Other (please specify):		6.6%	7
		answered question	106
		skipped question	2

3. Does your job include any of these functional duties? (check all that apply)			
		Response Percent	Response Count
Purchasing		36.8%	39
Sales		47.2%	50
Marketing		43.4%	46
Product development		59.4%	63
Nutritionist		25.5%	27
Environmental/regulatory compliance		26.4%	28
None of the above		3.8%	4
		<i>answered question</i>	106
		<i>skipped question</i>	2

4. On a scale of 1 to 5, please indicate your level of concern with the following issues as they relate to the success of your business (5=very concerned, 1=not at all concerned)

	1 - not at all concerned	2	3	4	5 - very concerned	Response Count
Availability of water resources	22.3% (23)	25.2% (26)	22.3% (23)	16.5% (17)	13.6% (14)	103
Availability of cereals and grains	20.4% (21)	17.5% (18)	22.3% (23)	20.4% (21)	19.4% (20)	103
Availability of proteins	14.9% (15)	10.9% (11)	21.8% (22)	31.7% (32)	20.8% (21)	101
Legislation that imposes burdens on your business	4.9% (5)	11.7% (12)	11.7% (12)	30.1% (31)	41.7% (43)	103
Regulations against certain feed ingredients	11.7% (12)	7.8% (8)	21.4% (22)	28.2% (29)	31.1% (32)	103
Regulations in general affecting pet food	4.9% (5)	5.8% (6)	26.2% (27)	28.2% (29)	35.0% (36)	103
Traceability requirements for ingredients	10.8% (11)	6.9% (7)	23.5% (24)	31.4% (32)	27.5% (28)	102
Consumer demands for including certain ingredients	11.8% (12)	6.9% (7)	38.2% (39)	20.6% (21)	22.5% (23)	102
Consumer demands for excluding certain ingredients	16.5% (17)	3.9% (4)	25.2% (26)	33.0% (34)	21.4% (22)	103
Consolidation of retail channels	12.0% (12)	20.0% (20)	37.0% (37)	18.0% (18)	13.0% (13)	100
Fragmentation of retail channels	17.2% (17)	29.3% (29)	37.4% (37)	10.1% (10)	6.1% (6)	99
Access to investment capital, business loans	14.9% (15)	29.7% (30)	25.7% (26)	17.8% (18)	11.9% (12)	101
	<i>answered question</i>					105
	<i>skipped question</i>					3

5. How do you think consumers define “green” pet foods? (Check all that apply)			
		Response Percent	Response Count
Certified organic ingredients		50.5%	51
Natural ingredients		77.2%	78
Human-grade ingredients		26.7%	27
No artificial ingredients/colors/preservatives		65.3%	66
“Holistic” claims		34.7%	35
Minimal packaging		40.6%	41
Recyclable packaging		60.4%	61
Packaging with natural materials		42.6%	43
No animal testing		24.8%	25
Manufacturer employs sustainable practices (such as conservation of energy or water) in plant operations.		51.5%	52
Manufacturer supports pet charities, shelters, etc.		16.8%	17
Other (please specify):		5.9%	6
		<i>answered question</i>	101
		<i>skipped question</i>	7

6. Are you currently using any “green” or sustainability claims to promote your products?			
		Response Percent	Response Count
Yes		51.0%	51
No		33.0%	33
Not sure		16.0%	16
		<i>answered question</i>	100
		<i>skipped question</i>	8

7. Are “green” positioning and claims becoming more or less important to your <i>marketing</i> , compared with a few years ago?			
		Response Percent	Response Count
A lot more important		27.7%	28
Somewhat more important		44.6%	45
Remaining about the same in importance		15.8%	16
Somewhat less important		1.0%	1
A lot less important		4.0%	4
Not sure		6.9%	7
		<i>answered question</i>	101
		<i>skipped question</i>	7



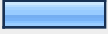


8. Are “green” positioning and claims becoming more or less important to your sales, compared with a few years ago?			
		Response Percent	Response Count
A lot more important		19.0%	19
Somewhat more important		44.0%	44
Remaining about the same in importance		25.0%	25
Somewhat less important		2.0%	2
A lot less important		2.0%	2
Not sure		8.0%	8
		<i>answered question</i>	100
		<i>skipped question</i>	8

9. Compared with other consumer product industries, how far do you think the petfood industry has gone to apply sustainable practices?			
		Response Percent	Response Count
Farther than most		14.1%	13
About the same as most		45.7%	42
Not as far as most others		32.6%	30
Not sure		7.6%	7
		<i>answered question</i>	92
		<i>skipped question</i>	16



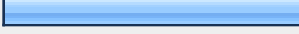
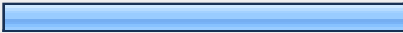

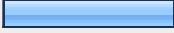
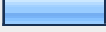

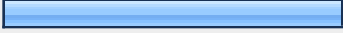

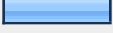
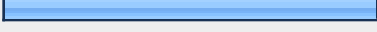


10. To what extent do your company operations currently apply sustainable practices?			
		Response Percent	Response Count
To a large extent		28.3%	26
To a moderate extent		37.0%	34
To a limited extent		28.3%	26
Not at all		2.2%	2
Not sure		4.3%	4
		<i>answered question</i>	92
		<i>skipped question</i>	16

11. Compared to other companies in your industry, how far do you think your organization has gone in adopting sustainable practices?			
		Response Percent	Response Count
Farther than most		35.9%	33
About the same as most		50.0%	46
Not as far as most others		7.6%	7
Not sure		6.5%	6
		<i>answered question</i>	92
		<i>skipped question</i>	16






12. How important do you think it is for your organization to be a leader in adopting sustainable practices?

		Response Percent	Response Count
Very Important		41.3%	38
Somewhat important		35.9%	33
Not very important		15.2%	14
Not at all important		3.3%	3
Not sure		4.3%	4
		<i>answered question</i>	92
		<i>skipped question</i>	16






13. What are the reasons your operation is adopting green and sustainable practices? (please check all that apply)


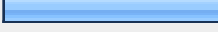



		Response Percent	Response Count
Nature of products/market		53.3%	49
Required by current regulations		15.2%	14
Anticipating regulations in the near future		45.7%	42
Consumer demand		62.0%	57
Cost savings		21.7%	20
Keep up with others in the industry		26.1%	24
Required by retailers		15.2%	14
Required by shareholders/other stakeholders		8.7%	8
Corporate image		52.2%	48
Marketability		52.2%	48
Profitability		16.3%	15
Right thing to do		57.6%	53
Don't know; not applicable		5.4%	5
Other (please specify):		1.1%	1
		<i>answered question</i>	92
		<i>skipped question</i>	16





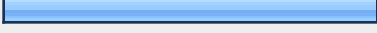
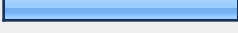
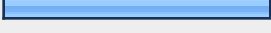

14. What do you think is the likelihood that increased sustainability will lead to increasing long-term profits for your company?

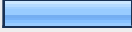
		Response Percent	Response Count
Very likely		21.7%	18
Somewhat likely		45.8%	38
Not very likely		22.9%	19
Not at all likely		3.6%	3
Don't know		6.0%	5
		<i>answered question</i>	83
		<i>skipped question</i>	25


15. Are there any sustainability practice areas that either (1) already have delivered or (2) have significant potential to deliver a strong return on investment (ROI) for your operations?			
	Already Has Delivered	Has Potential to Deliver	Response Count
Conservation of energy	54.5% (36)	45.5% (30)	66
Conservation of water	43.1% (25)	56.9% (33)	58
Distribution/transportation	40.4% (23)	59.6% (34)	57
Facility alterations/retrofitting	32.1% (17)	67.9% (36)	53
Facility new design/construction	29.1% (16)	70.9% (39)	55
Material substitution (non-toxic for toxic, renewable for non-renewable)	37.3% (19)	62.7% (32)	51
Power sources	32.8% (19)	67.2% (39)	58
Product formulation	50.9% (28)	49.1% (27)	55
Product packaging	46.7% (28)	53.3% (32)	60
Production systems	25.0% (13)	75.0% (39)	52
Purchasing/sourcing	43.4% (23)	56.6% (30)	53
Recycling	49.2% (29)	50.8% (30)	59
Sanitation	33.3% (17)	66.7% (34)	51
Supply chain structure	34.7% (17)	65.3% (32)	49
Transportation/distribution systems	42.9% (21)	57.1% (28)	49
Waste minimization/disposal systems	50.0% (30)	50.0% (30)	60
	<i>answered question</i>		76
	<i>skipped question</i>		32

16. How important is it to have relationships with your customers that address long term sustainability?			
		Response Percent	Response Count
Very important		42.2%	35
Somewhat important		44.6%	37
Not very important		8.4%	7
Not at all important		1.2%	1
Don't know		3.6%	3
		<i>answered question</i>	83
		<i>skipped question</i>	25

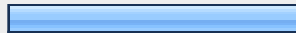
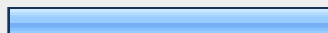

17. How important is it to have relationships with your suppliers that address long term sustainability?			
		Response Percent	Response Count
Very important		57.1%	48
Somewhat important		33.3%	28
Not very important		3.6%	3
Not at all important		2.4%	2
Don't know		3.6%	3
		<i>answered question</i>	84
		<i>skipped question</i>	24

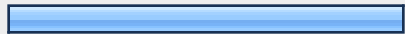
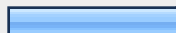
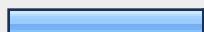
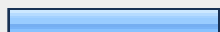
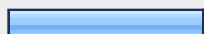
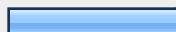
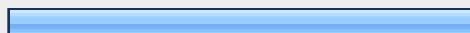

18. What do you expect from your suppliers in terms of meeting sustainability objectives? (check all that apply)			
		Response Percent	Response Count
Competitive prices		73.8%	59
New technologies		60.0%	48
Streamlined supply chain		51.3%	41
Green image		46.3%	37
Environmental policy		57.5%	46
Animal welfare policy		36.3%	29
Corporate sustainability policy		41.3%	33
Other (please specify):		2.5%	2
		<i>answered question</i>	80
		<i>skipped question</i>	28

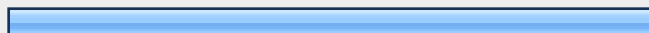
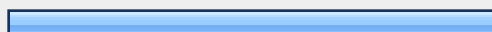



19. Is your company required to report sustainability measures to any of the following?			
		Response Percent	Response Count
Shareholders		24.4%	10
Regulatory bodies		19.5%	8
Retailers		22.0%	9
Other stakeholders		34.1%	14
		<i>answered question</i>	41
		<i>skipped question</i>	67

20. Does your company have a person in charge of sustainability initiatives?			
		Response Percent	Response Count
Yes		42.0%	34
No		46.9%	38
Not sure		11.1%	9
answered question			81
skipped question			27

21. What is that person's title?			Response Count
			27
answered question			27
skipped question			81

22. Do your job responsibilities include developing or implementing sustainability initiatives?			
		Response Percent	Response Count
Yes		44.4%	36
No		49.4%	40
Unsure		6.2%	5
answered question			81
skipped question			27

23. Where are you getting information about sustainable practices for your industry? (choose all that apply)			
		Response Percent	Response Count
Suppliers		60.8%	45
Corporate headquarters		25.7%	19
University/Ag extension		29.7%	22
Federal-level US government agencies (USDA, FDA)		32.4%	24
Global organizations (FAO)		29.7%	22
State/regional level government agencies		25.7%	19
Trade and industry associations		71.6%	53
Other (please specify):		9.5%	7
		<i>answered question</i>	74
		<i>skipped question</i>	34

24. Could we contact you to discuss your responses? If yes, please give us your information below.			
		Response Percent	Response Count
Name:		100.0%	16
Company:		75.0%	12
Country:		75.0%	12
Email Address:		68.8%	11
Phone Number:		50.0%	8
		<i>answered question</i>	16
		<i>skipped question</i>	92

25. Would you like to enter the drawing to win a FREE registration to [Petfood Forum 2010](#)?* If yes, please provide your information below:

		Response Percent	Response Count
Name:	<input type="text"/>	100.0%	15
Company:	<input type="text"/>	100.0%	15
Address 1:	<input type="text"/>	100.0%	15
Address 2:	<input type="text"/>	13.3%	2
City/Town:	<input type="text"/>	100.0%	15
State/Province:	<input type="text"/>	100.0%	15
ZIP/Postal Code:	<input type="text"/>	100.0%	15
Country:	<input type="text"/>	100.0%	15
Email Address:	<input type="text"/>	100.0%	15
Phone Number:	<input type="text"/>	100.0%	15
		<i>answered question</i>	15
		<i>skipped question</i>	93